*info*Advantage – WebIntelligence

For Advanced Users

Presented by CGI-AMS

July 19, 2005

Agenda

Advanced Topics covers Editing Reports

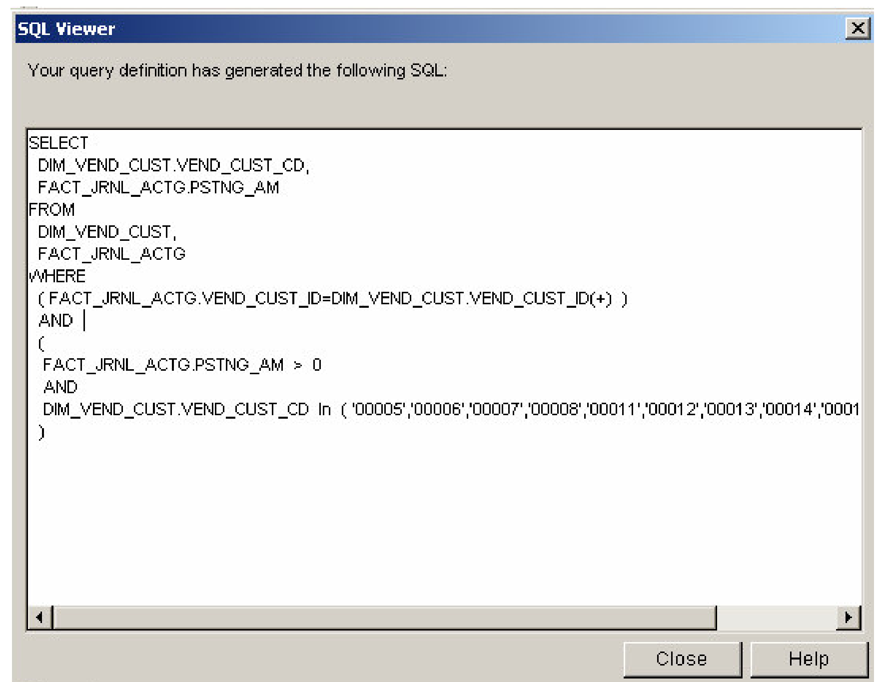
Java Panel:

- Toolbars
- Enhanced Data Display
  - Create additional report in document
  - Modify Tables
  - Add Charts, Cells
- Modify Data Lay Out
  - Apply calculations
  - Section document

Toolbars in WebIntelligence – Query Mode

Query Toolbar

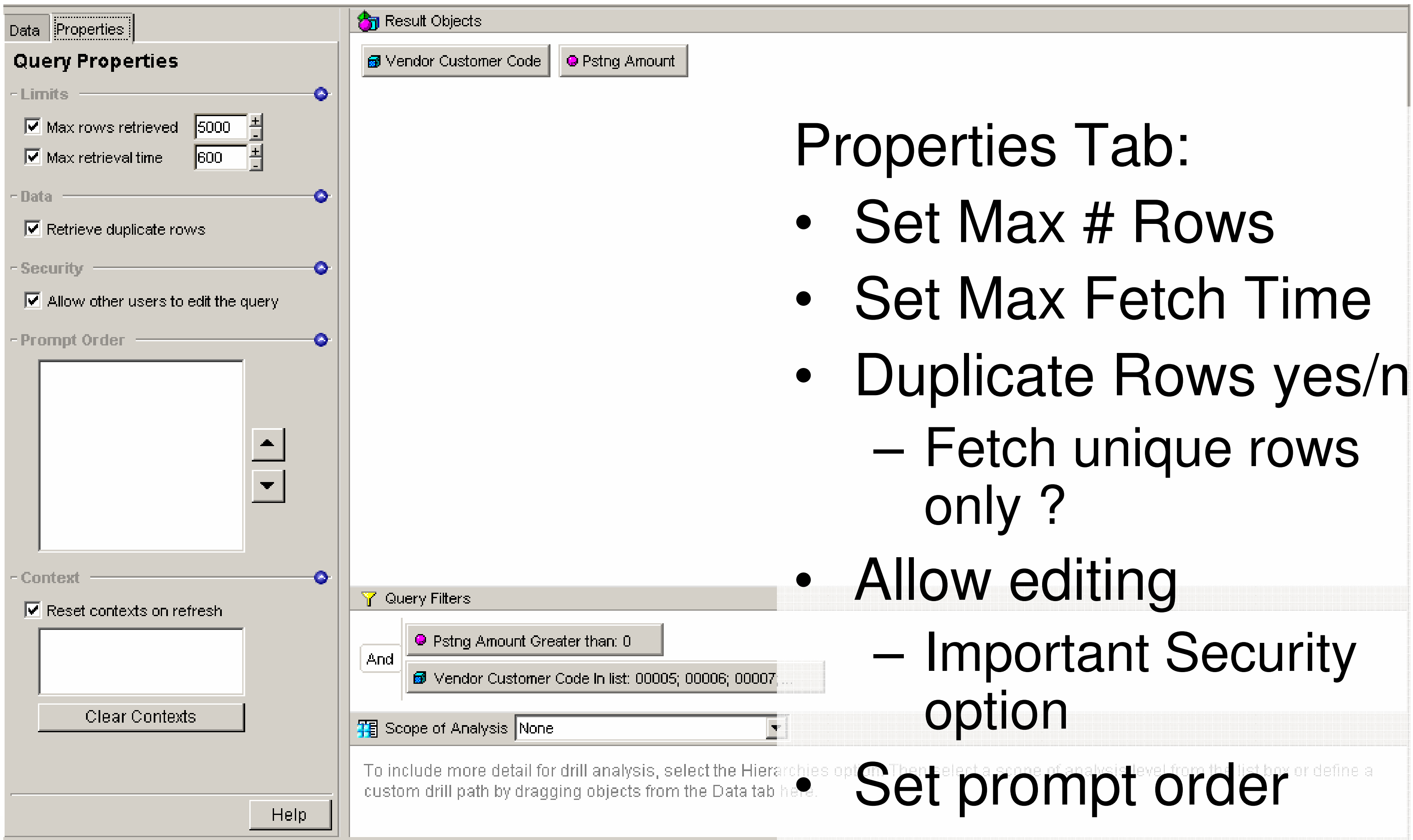
- Visible when in Query Mode



Show/Hide

- Manager: Left hand panel
- Filter Pane: see what filters are applied
- Scope of Analysis: allow drilling to certain extent
- Show SQL: actual statement executed against the DB

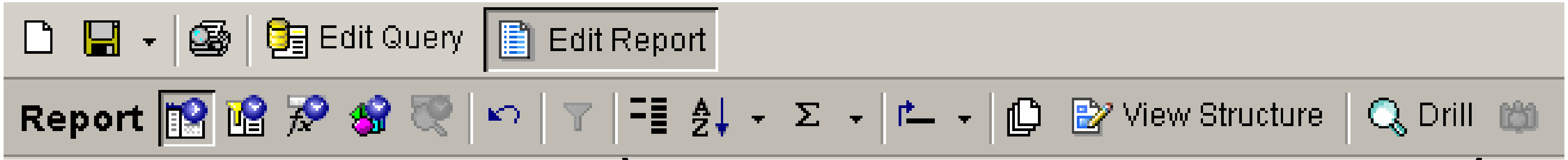
Data Retrieve Settings



Properties Tab:

- Set Max # Rows
- Set Max Fetch Time
- Duplicate Rows yes/no
  - Fetch unique rows only ?
- Allow editing
  - Important Security option
- Set prompt order

Toolbars in WebIntelligence – Report View



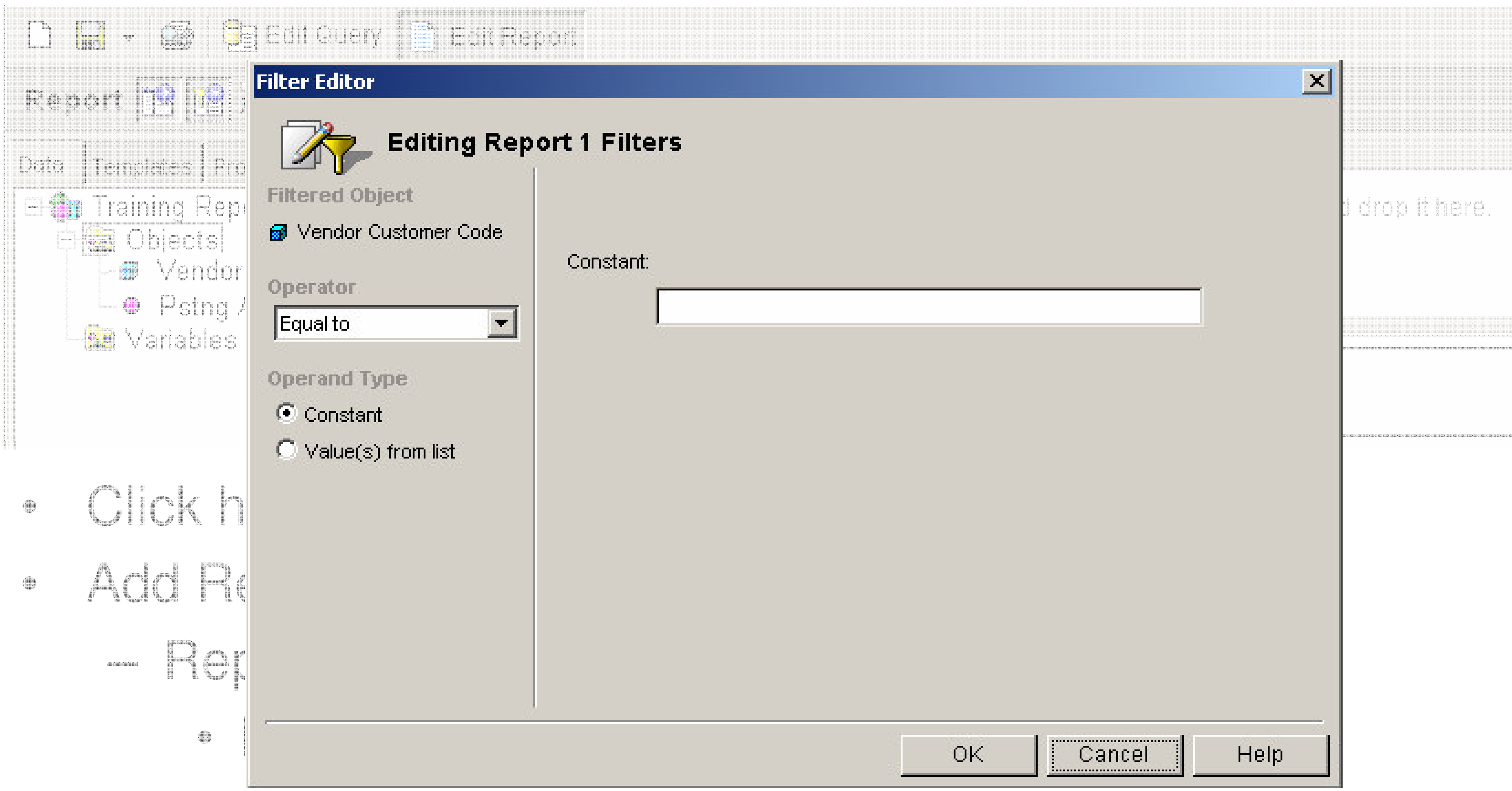
Show/hide:

- Manager
- Filter Pane
- Formula Toolbar
- Variable Editor

Apply:

- Breaks
- Sorts
- Calculations
- Insert a row/column
- Page View
- Structure View
- Drill

View Filter Pane



- Click h
- Add Re
  - Rep
    - Can be applied to entire report or just blocks
- Drag and Drop Objects
- Box will pop up to define filter

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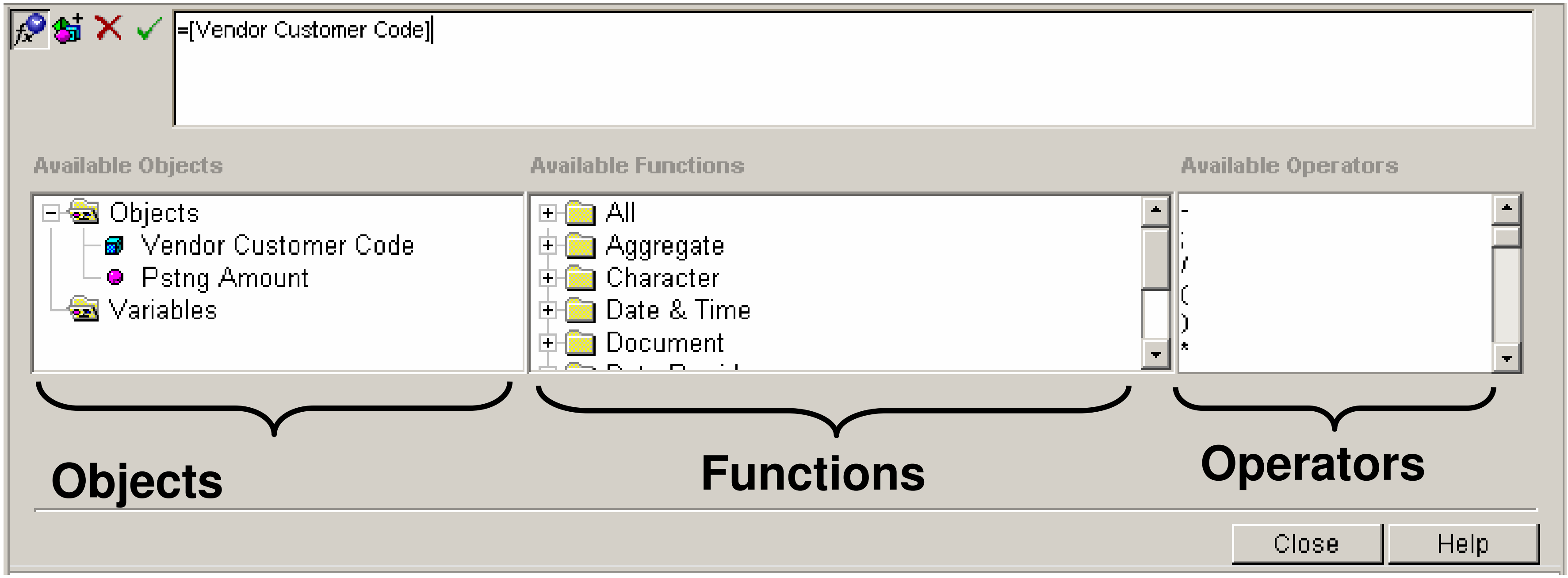
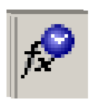
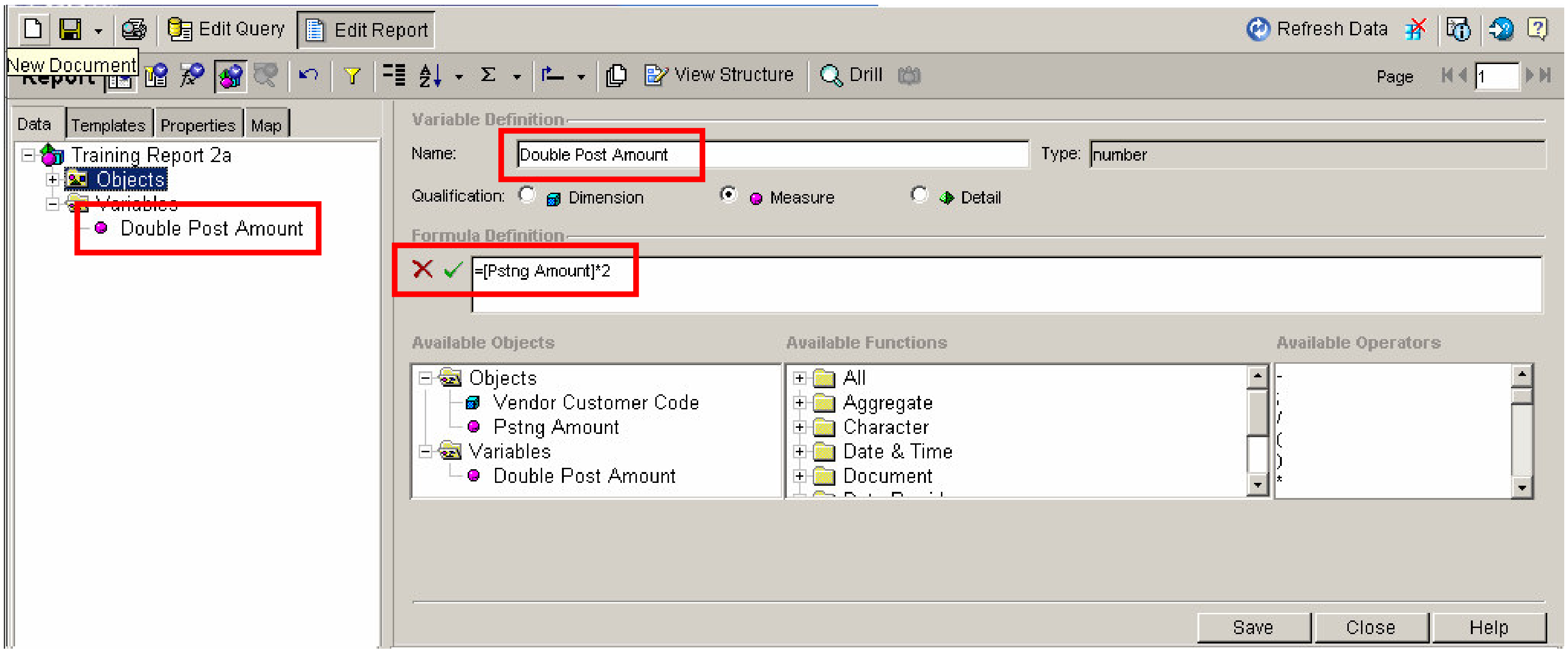
View Formula Toolbar



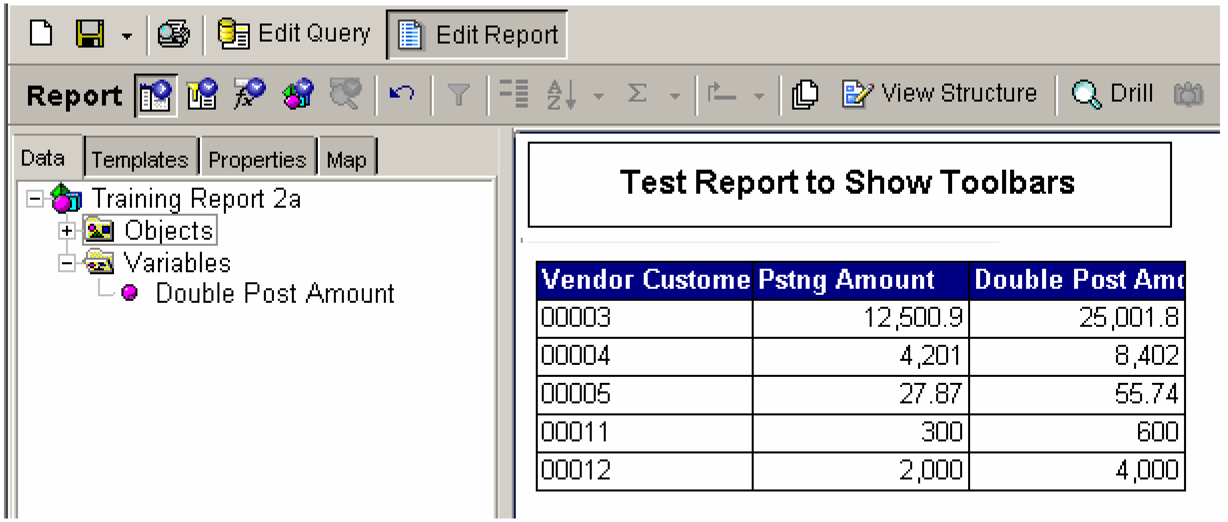
- Click on view/hide Formula toolbar
- Double click on  to expand
- Create complex Formulas !!!

Variable Editor



- Users can create their own variables
- Will be stored on Server, so they are shared !!!!
- Will show in variables section
  - Example: Double Post Amount

Use new variable



Vendor Custome	Pstng Amount	Double Post Amo
00003	12,500.9	25,001.8
00004	4,201	8,402
00005	27.87	55.74
00011	300	600
00012	2,000	4,000

38,059.54

1. Drag and drop new variable into table
2. Drag and drop anywhere else
   - **What will the result be ?**

Structure View / Results View

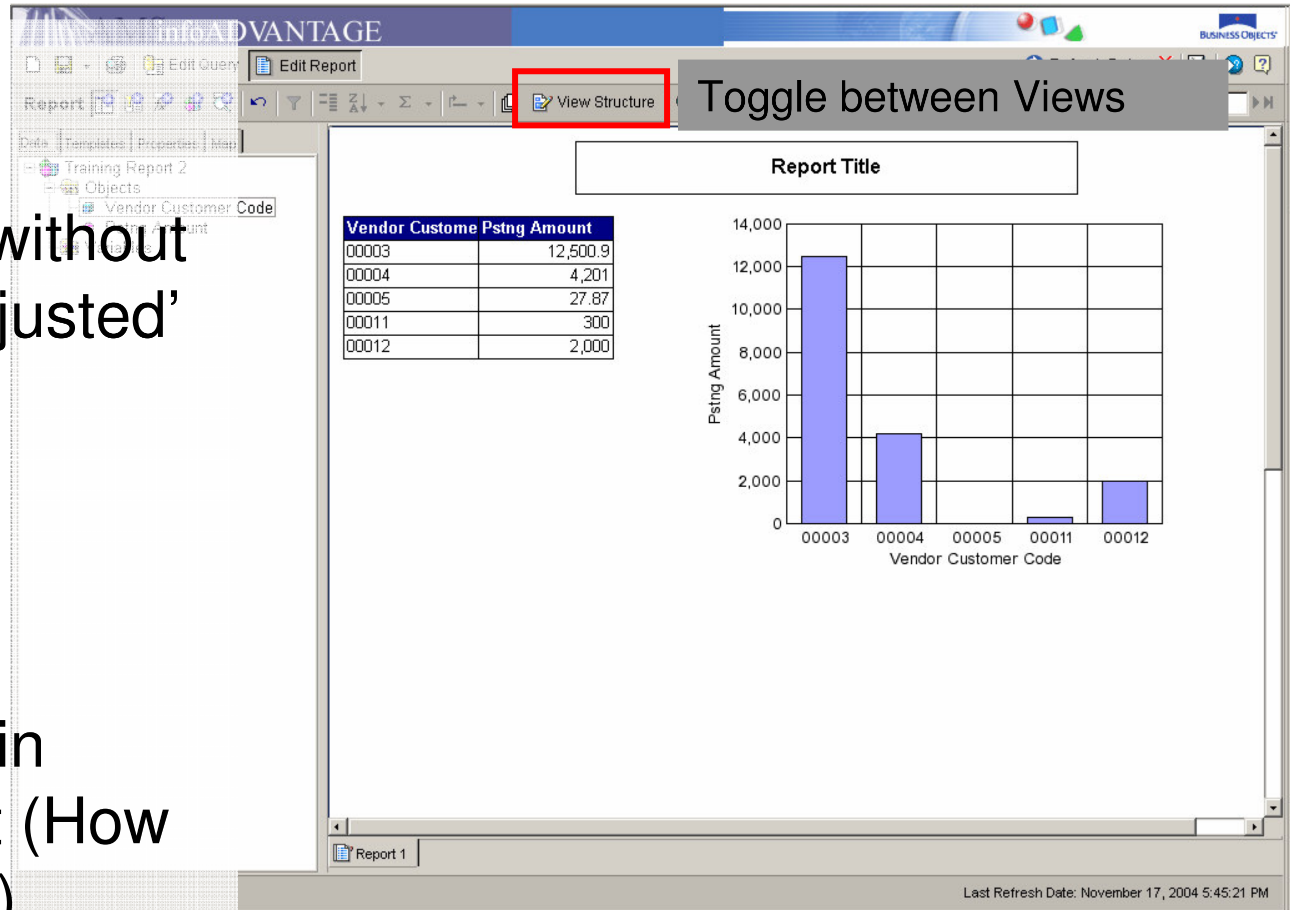
Structure view:

- 'Preview' modifications without data being 'adjusted' every time
- Easy to apply changes

Results view:

- Displays data in defined format (How user will see it)

Toggle between the two



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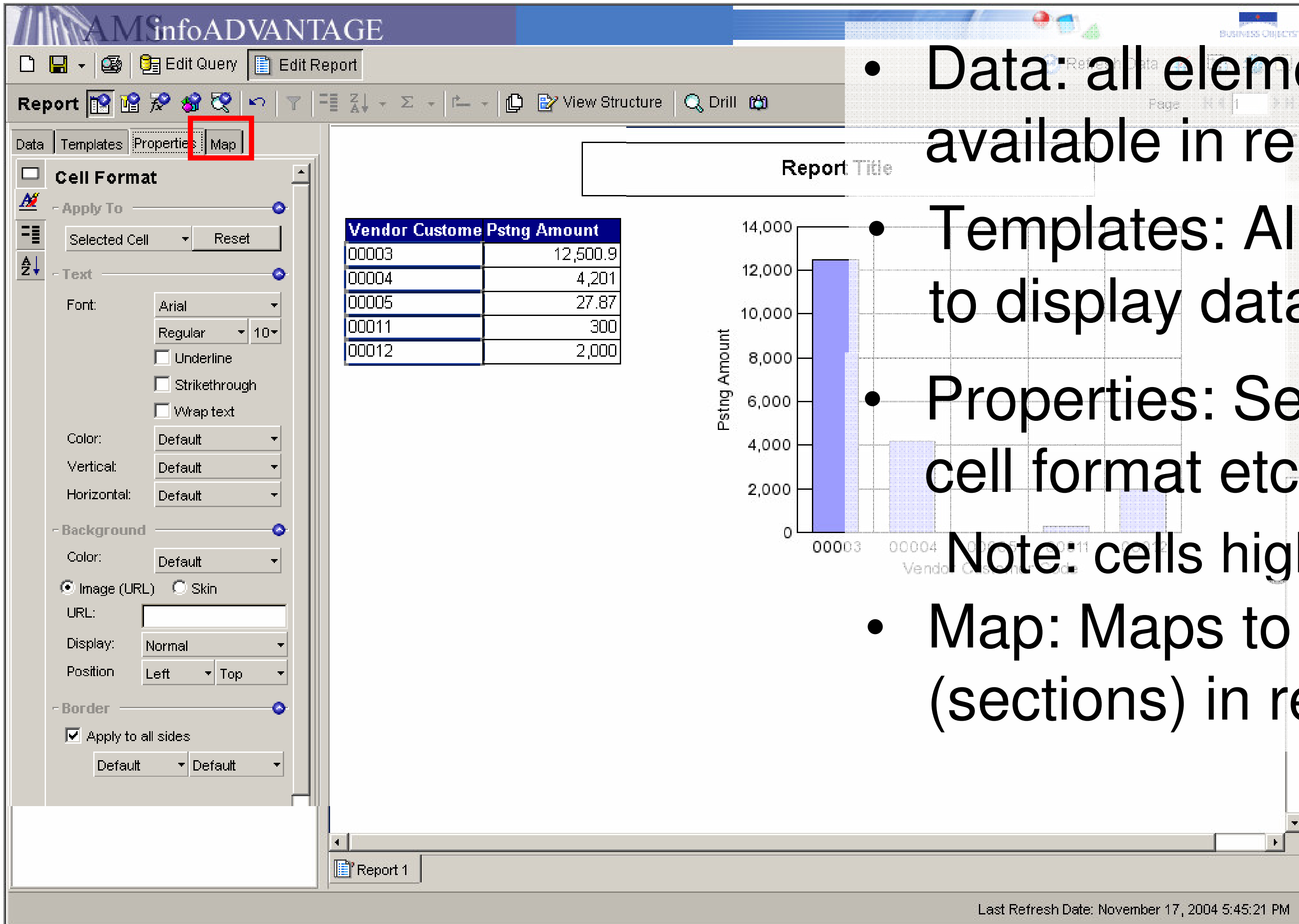
Different Data Manipulation Options



- Data: all elements available in report
- Templates: All options to display data
- Properties: Set colors, cell format etc
  Note: cells highlighted
- Map: Maps to (sections) in report

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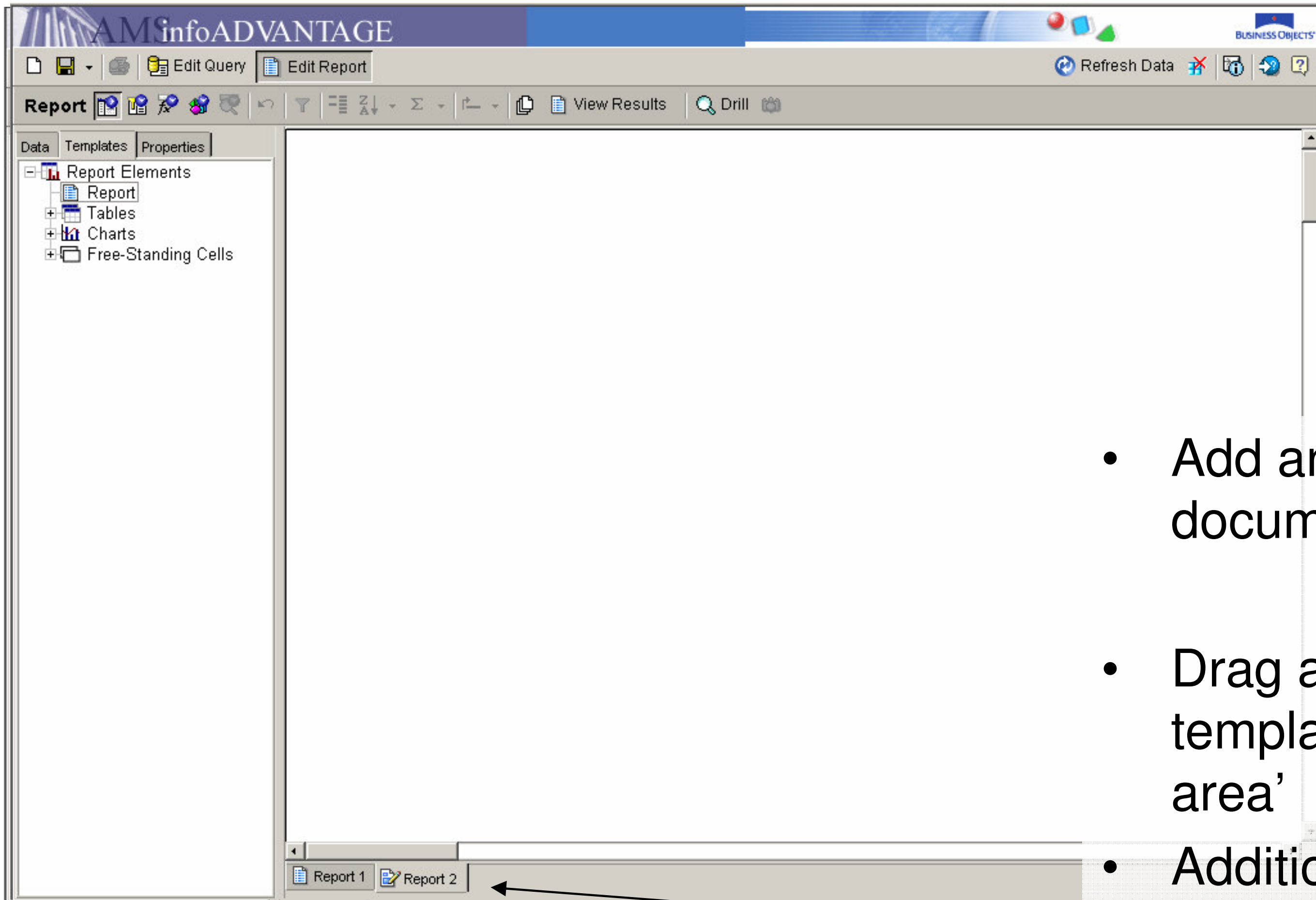
Templates - Add a report



- Add an extra 'tab' to the document
- Drag and drop 'report' template into 'work area'
- Additional report screen created automatically

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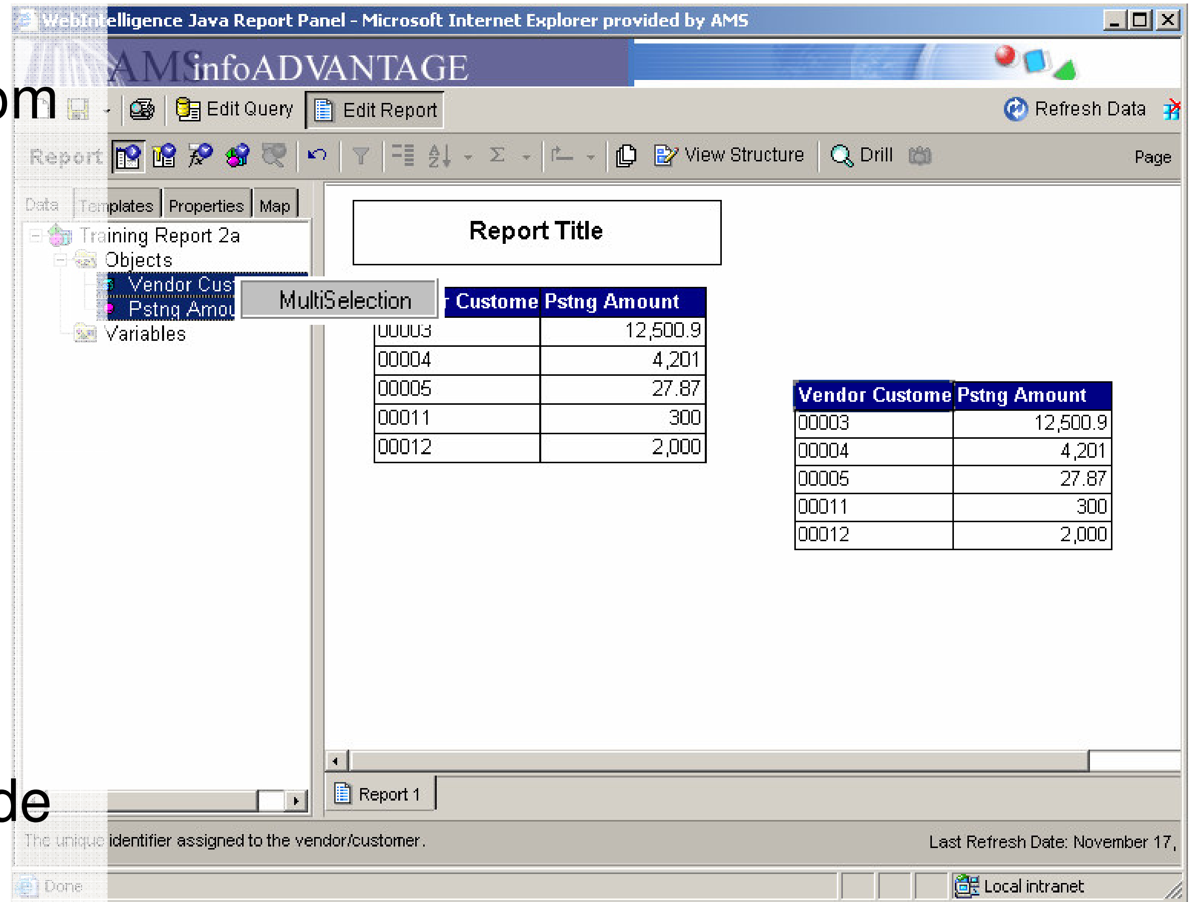
Adding a table/chart – Drag and Drop

1. Just ‘drag and drop’ the fields needed from the data tab

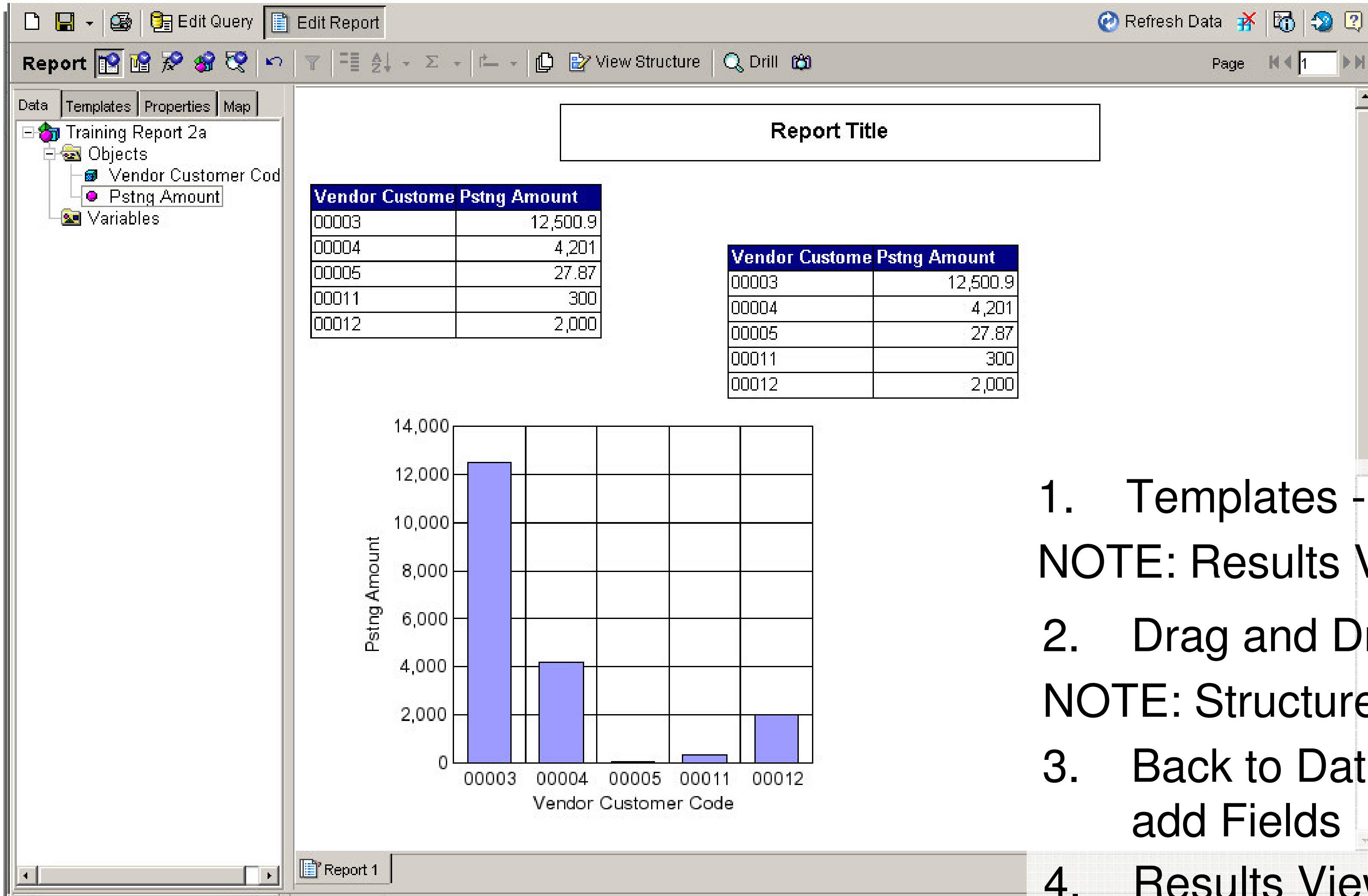
Or

2. Go to templates

- Insert correct table/chart
- Add fields through ‘drag and drop’ from Data tab
- Example on next slide



Add a chart - Templates



1. Templates -> chart

NOTE: Results View

2. Drag and Drop,

NOTE: Structure View

3. Back to Data Tab, add Fields

4. Results View

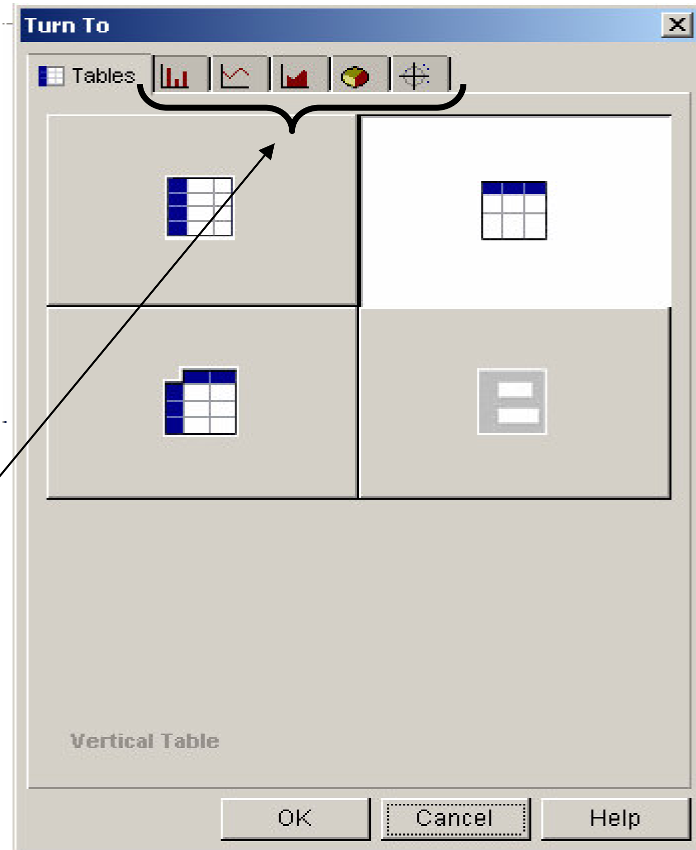
Display Data in Different Ways

Edit Table:

- Point to edge of table (grey square appears)
- Right mouse click -> Turn To
- Display in Tables:
- Horizontal, Vertical
- CrossTab, Form
- Or change to Chart, etc

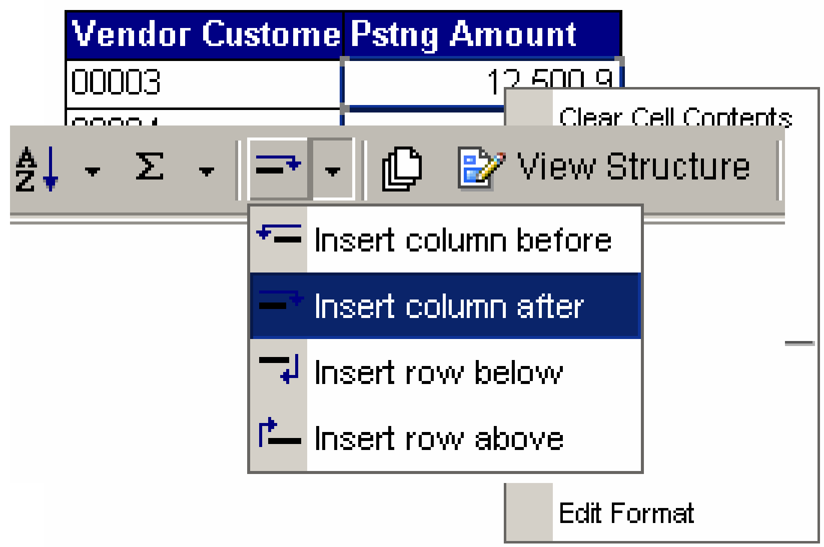
Grey Square

Tabs to change lay out

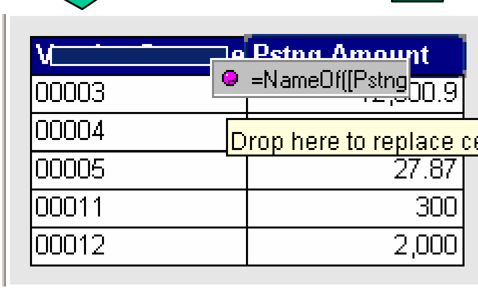


Modify an Existing Table

- ‘Drag and Drop’ to add additional fields
  - Be careful not to create crosstabs
- Remove fields
  - Entire Columns
  - Contents
- Add Fields/Columns
- Swap fields
  - Through Drag/Drop



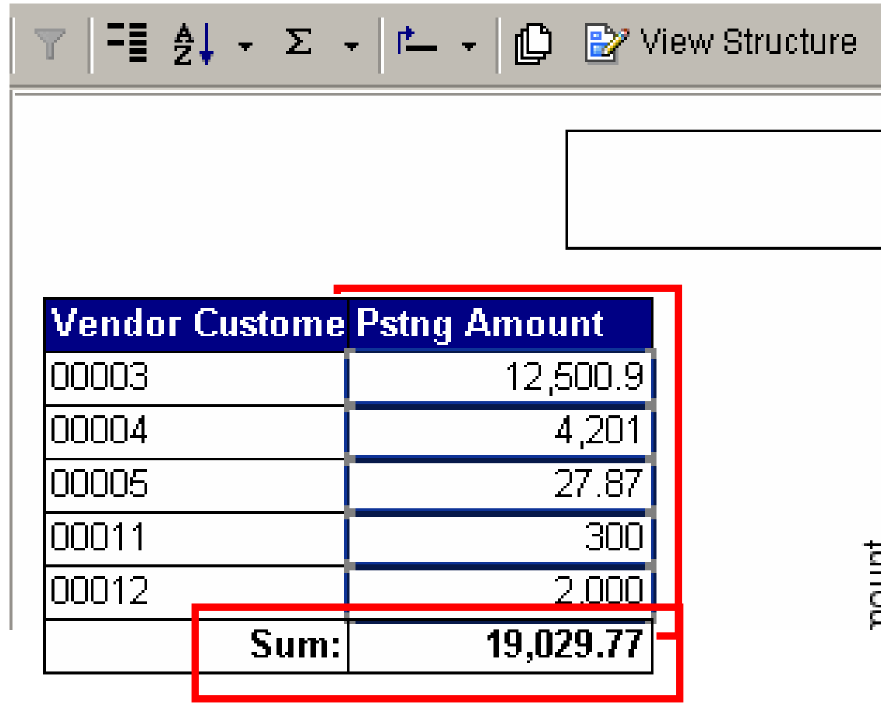
Vendor Custome	Pstng Amount
00003	12,500.9
00004	4,201
00005	27.87
00011	300
00012	2,000

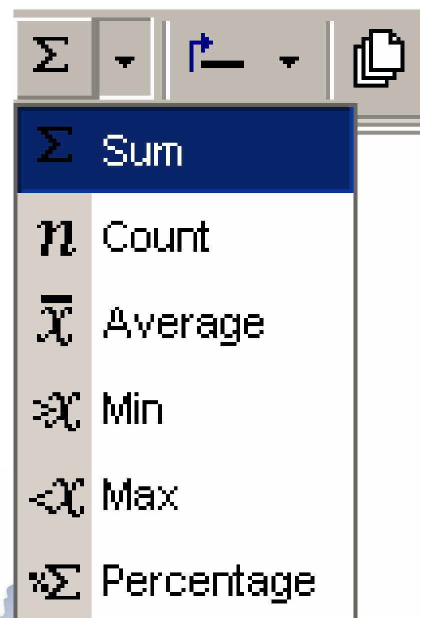


Pstng Amount	Vendor Custome
12,500.9	00003
4,201	00004
27.87	00005
300	00011
2,000	00012

Add Calculations

- Standard
  - Sum/Count etc
    - Select cell
    - Click on Σ
    - Sum appears





- Standard options
- Note: Count can be applied to all fields, other calculations only to numeric fields

Modify Existing Table – 2

Add Breaks

- Better readable table

1. Highlight the field
2. Select Insert/Remove Break
3. See results
4. Modify footers
   - Example:
   - Add sum
   - Remove line in between

View Structure

Vendor Custome	Pstng Amount
00003	12,500.9
00003	**12,500.9**
Vendor Custome	**Pstng Amount**
00004	4,201
00004	**4,201**
Vendor Custome	**Pstng Amount**
00005	27.87
00005	**27.87**
Vendor Custome	**Pstng Amount**
00011	300
00011	**300**
Vendor Custome	**Pstng Amount**
00012	2,000
00012	**2,000**
Sum:	**19,029.77**

00012	2,000
00012	

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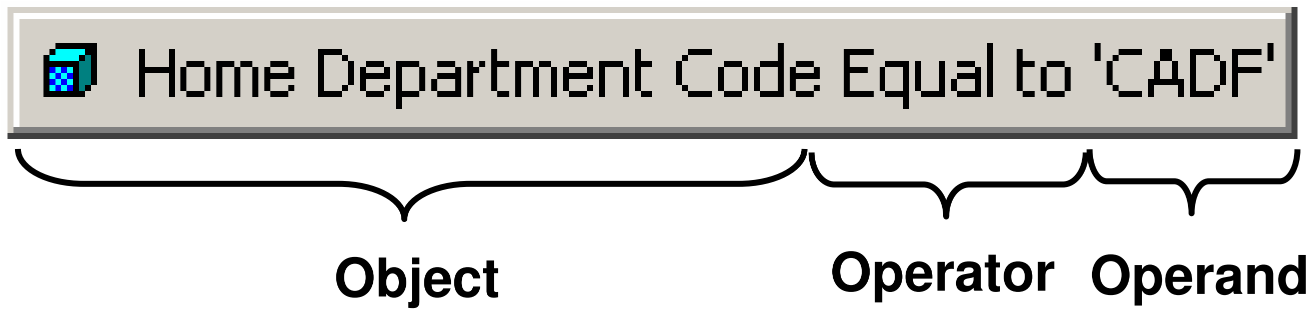
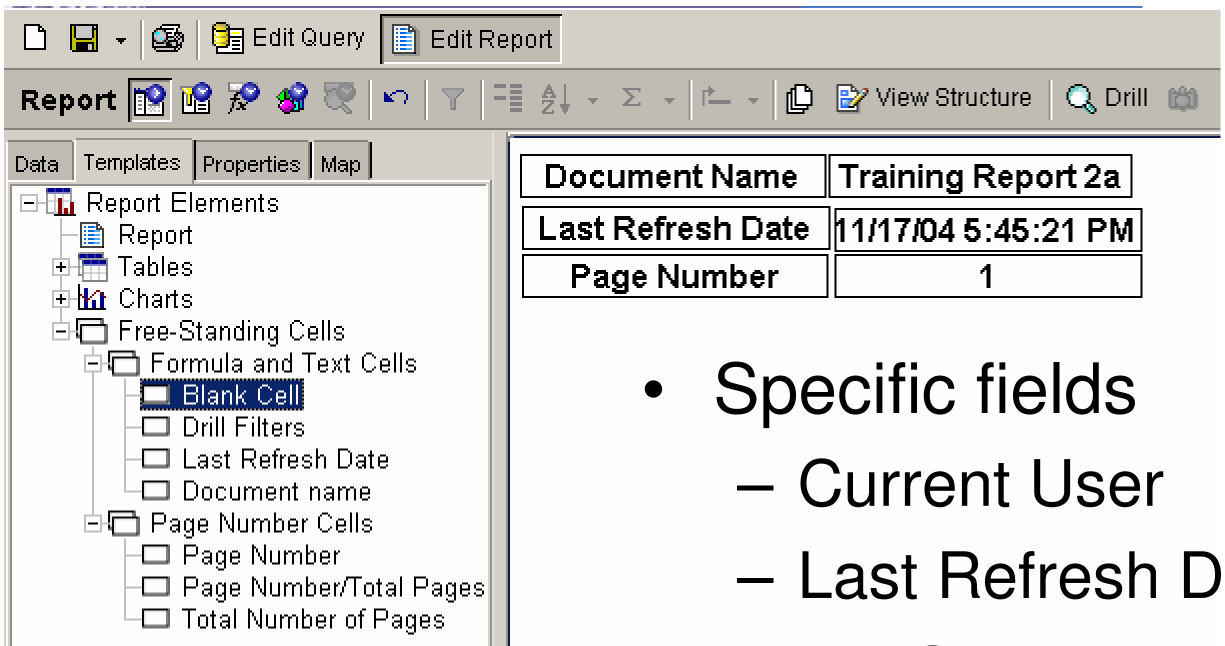
Filters – Advanced Topics

- Filter lay out:



- Report filters
  - Entire report
  - Just one block
- Query Filter
  - Advanced
    - Subquery
- Use wild cards: %, matches pattern
- Add Prompts

Add stand alone cells



- Specific fields
  - Current User
  - Last Refresh Date, etc
- Blank/Custom cells
  - Tip: use Min/Max to prevent Multiple Values
  - Add Custom Formula

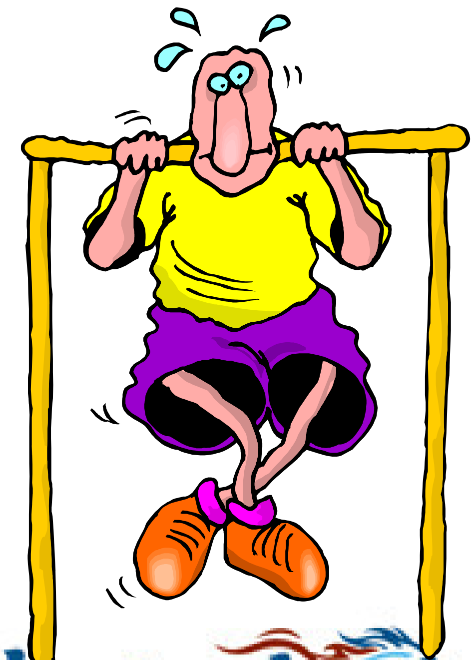
Save and Print Documents

- Don’t forget to save changes !!!
- Print document:
  - Save/View as PDF
  - Print

Exercise / Workshop 1

- Use report created in previous workshop:
  - Universe: Accounts Receivable
  - Fields: Headquarters account code, Debit amount
- Set filter to reduce number of records returned

- Add a column that contains Debit Amounts * 2
  - (HINT: create a formula in the new column)
- Add a graph/chart that reflects the data
- *Extra: add breaks/sections etc.*



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Questions